

**Remarks**

The Office Action mailed March 6, 2006 has been carefully reviewed and the foregoing amendments have been made in consequence thereof.

Claims 1-3, 5-18, 20-42, 48-49, 51-54, 61-70 and 75-78 stand rejected. Claims 4, 19, 43-47, 50, 55-60, 66, and 71-74 have been canceled. Claims 79-84 have been newly added. Claims 1-3, 5-18, 20-42, 48-49, 51-54, 61-65, 67-70 and 75-84 are now pending in this application.

The rejection of Claims 1-3, 5-18, 20-42, 48-49, 51-53, 61-65, 67-70 and 75-78 under 35 U.S.C. § 103(a) as being unpatentable over Libman (U.S. Patent No. 5,987,434) ("Libman") in view of Fredell et al. (U.S. Patent No. 6,678,698) ("Fredell") is respectfully traversed.

Applicants respectfully submit that the Section 103 rejection based on Libman and Fredell is not a proper Section 103 rejection because the Fredell patent is not prior art to the present patent application. The Fredell patent was filed on February 14, 2001, which is after the January 27, 2001 filing date of the present patent application. Fredell, however, claims priority to Provisional Patent Application No. 60/182,796, which was filed on February 15, 2000. However, the Office Action does not cite to or rely on the disclosure of Provisional Application No. 60/182,796. Rather, the Office Action relies exclusively on the disclosure of the Fredell patent. Applicants respectfully submit that the disclosure included within the Fredell patent is not the same as the disclosure included within Provisional Application No. 60/182,796.

Accordingly, Applicants respectfully submit that Fredell is not prior art to the present patent application because it was not filed prior to the present patent application. Moreover, although Provisional Application 60/182,796 was filed before the present patent application, it was not relied on by the Examiner in the Office Action and its disclosure is different from the Fredell patent.

Accordingly, for at least these reasons, Applicants respectfully request that the Section 103 rejection of Claims 1-3, 5-18, 20-42, 48-49, 51-53, 61-65, 67-70 and 75-78 be withdrawn.

In addition, Applicants further submit that no combination of Libman and Fredell describes or suggests the claimed invention. As discussed below, at least one of the differences between the cited references and the present invention is that neither Libman nor Fredell, alone or in combination, describe nor suggest a method for offering and managing a deal process between a business entity and at least one customer using a server system coupled to a database and in communication with a client system and having a plurality of users, wherein the method includes *creating at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, wherein the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity.* (Emphasis added.)

Moreover, Applicants submit that neither Libman nor Fredell, alone or in combination, describe or suggest a method that includes the step of *prompting a permissioned user associated with the business entity to create a deal and a deal library for each selected proposed deal at the server system, wherein the deal library for each selected deal includes an organizational structure for storing information therein that is automatically created based on the type of deal selected, and includes at least one default template that is automatically stored therein and is based upon the type of deal selected.* (Emphasis added.)

Applicants further submit that neither Libman nor Fredell, alone or in combination, describe or suggest a method that includes the steps of *assigning the customer to the deal team for each selected deal and granting permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal and enabling the customer to monitor the progress of each assigned deal by displaying on the client system a status of each deal.* (Emphasis added.)

In addition, neither Libman or Fredell, alone or in combination, describe or suggest the elements recited in the newly added dependent Claims 79-83. For example, Claim 79 recites a method in accordance with Claim 1 wherein the method further includes the step of “updating

the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.”

Applicants also submit that there is no teaching, suggestion or motivation for the combination of Libman and Fredell. As explained below, Libman describes an apparatus and a method that use client information to automatically select and present financial products appropriate for the client, as well as perform automated tasks associated with the financial products. Fredell describes a web-based method and system for communicating and managing information while performing due diligence for a potential merger or acquisition. The Office Action asserts that Fredell is “analogous art as it also teaches managing information with respect to managing and marketing new projects [and]...[t]herefore it would have been obvious to one of ordinary skill in the art at the time of the invention to modify the management system of Libman with the permission granting, task assignment, milestone and status tracking features of Fredell...”

Applicants traverse this assertion. Applicants submit that there is no motivation to combine the teachings of Fredell with Libman. Fredell describes managing information as it relates to performing a due diligence but does not mention marketing financial products to potential clients; whereas, Libman describes marketing financial products to potential clients but does not mention conducting a due diligence. Accordingly, there is no motivation to combine these references.

For at least these reasons, Applicants request that the Section 103 rejection of Claims 1-3, 5-18, 20-42, 48-49, 51-53, 61-65, 67-70 and 75-78 be withdrawn.

Libman describes an apparatus that includes: a data input module that inputs information related to prospective clients; a decision making logic circuitry for using the inputted information to select financial products to offer to prospective clients; and a sales presentation and output module for preparing a client communication (e.g., letter) which offers the financial products. The output device automatically incorporates a portion of the client information and a portion of the financial products information into the client communication so as to require very little

human involvement. The apparatus also includes a telemarketing module and a new business module. The telemarketing module allows a client to update the client's information by contacting an operator who is logged into the system. The new business module creates records for new sales and also directs tasks that correspond with sales and new business. The new business module performs these tasks "automatically with no human intervention."

Notably, Libman emphasizes the preparation of offering financial products to a potential client and then performing simple, automated tasks for completing the transaction. Libman does not describe the steps of assigning a customer to a deal team for each selected deal of potentially a plurality of deals and granting permissions to the customer for accessing, via the at least one of a web page and portal, specific documents stored in the deal library corresponding with each selected deal. Also, Libman does not describe enabling the customer to monitor the progress of each assigned deal by displaying on the client system a status of each deal.

Fredell, as disclosed in Provisional Patent Application No. 60/182,796, describes a web-based method and system for communicating and managing information while performing due diligence related to possible acquisitions and mergers (See "Problem Statement" on page 27 of 72 from pdf file of the provisional application stored on the USPTO site). The system and method allows for accessing and managing due diligence documents, managing due diligence tasks, discussing due diligence issues, maintaining a user directory, maintaining a calendar, and viewing the status of due diligence projects.

Notably, Fredell does not describe offering at least one proposed deal to at least one prospective customer by displaying on the client system at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal and then enabling the customer to monitor the progress of each deal by displaying on the client system a status of each deal, where the customer gains access to the deal library through the at least one of the web page and portal.

Claim 1 recites a method for offering and managing at least one deal process between a business entity and a customer using a server system coupled to a database and in

communication with a client system and having a plurality of users. The server is associated with the business entity and the business entity is engaged in a business of offering at least one of products and services to prospective customers. The method comprises the steps of “prompting an administrator associated with the business entity to create a business profile at the server system for storing within the database, the business profile includes permissions granted to each user of the plurality of users associated with the business entity for at least one of accessing, creating, and modifying information stored within the database...identifying at least one prospective customer of the business entity...creating at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...offering the at least one proposed deal to the identified prospective customer by displaying on the client system the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal...prompting a permissioned user associated with the business entity to create a deal and a deal library at the server system after the prospective customer has selected the at least one proposed deal, wherein the deal library for each selected deal includes an organizational structure for storing information therein that is automatically created and based upon the type of deal selected, and includes at least one default template automatically stored therein and based upon the type of deal selected...designating the prospective customer that selected the at least one proposed deal as the customer of the business entity within the server system, each deal created at the server representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction...assigning members to a deal team for each deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal...assigning the customer to the deal team for each selected deal and granting permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal...assigning at the server system

tasks and milestones to be performed by the deal team members for completing each deal...notifying the deal team members of the assigned tasks to be performed and milestones...tracking each task and milestone for completing each deal...and enabling the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Neither Libman nor Fredell, considered alone or in combination, describe or suggest the method recited in Claim 1. More specifically, neither Libman nor Fredell, considered alone or in combination, describe or suggest a method for offering and managing a deal process using a server system coupled to a database and in communication with a client system, wherein the method includes *creating at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity and offering the at least one proposed deal to the identified prospective customer by displaying on the client system the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal.* (Emphasis added.)

Rather, Libman merely describes a method for incorporating client information and financial products into a client communication, such as a letter, and Fredell simply describes a web-based method and system for communicating and managing information for performing due diligence.

Moreover, neither Libman nor Fredell, alone or in combination, describe or suggest a method that includes *prompting a permissioned user associated with the business entity to create a deal and a deal library at the server system after the prospective customer has selected the at least one proposed deal, wherein the deal library for each selected deal includes an organizational structure for storing information therein that is automatically created and based upon the type of deal selected, and includes at least one default template automatically stored therein and based upon the type of deal selected.* (Emphasis added.)

Rather, Libman merely describes a database module for storing information related to the client. Notably, Libman does not describe or suggest creating a library for each deal, wherein the deal library includes an organization structure and at least one template based upon the type of deal selected. Fredell does not describe deal libraries including an organizational structure that are automatically created based upon the type of deal selected and includes at least one default template based upon the type of deal selected.

Furthermore, neither Libman nor Fredell, alone or in combination, describe or suggest a method that includes *assigning the customer to the deal team for each selected deal and granting permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal and enabling the customer to monitor the progress of each deal by displaying on the client system a status of each deal.* (Emphasis added.)

Rather, Libman merely describes a telemarketing module that allows the client to communicate with an operator in order to update the client's information. Libman does not describe or suggest granting permissions to the customer to access documents and to monitor the progress of each deal via the webpage or portal. Moreover, Fredell simply describes allowing users related to a project to view documents stored on the system's database. Fredell does not describe or suggest allowing customers to view documents and monitor progress of a deal through the same webpage or portal that was used to offer the deal.

The Office Action asserts that Fredell discloses "assigning the customer to the deal team..." Applicants traverse this assertion. Fredell does not disclose a "customer" as recited in Claim 1. Rather, Fredell describes a system where the parties are already engaged in performing due diligence for a potential acquisition or merger. The parties are not using the system to attract prospective customers nor to assign designated customers to a deal team.

Thus, because Libman and Fredell do not teach or suggest one or more of the claimed elements, it follows that a combination of Libman and Fredell cannot teach or suggest such elements. Accordingly, for at least the reasons set forth above, Applicants respectfully submit that Claim 1 is patentable over Libman in view of Fredell.

For at least the reasons set forth above, Applicants respectfully submit that Claim 1 is patentable over Libman in view of Fredell.

Claims 2, 3 and 5-15 depend, directly or indirectly, from independent Claim 1. When the recitations of Claims 2, 3 and 5-15 are considered in combination with the recitations of Claim 1, Applicants submit that dependent Claims 2, 3 and 5-15 likewise are patentable over Libman in view of Fredell.

Furthermore, newly added Claim 79 depends from independent Claim 1 and recites a method that further includes “the step of updating the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 79 likewise is patentable over Libman in view of Fredell.

Claim 16 recites a system comprising at least one computer configured as a server associated with a business entity engaged in a business of offering at least one of products and services to prospective customers, said server coupled to a database for storing business profiles, libraries and templates and at least one client system connected to said server through a network, said server configured to “prompt an administrator associated with the business entity to create a business profile, the business profile includes permissions granted to each user of a plurality of users associated with the business entity for at least one of accessing, creating, and modifying information stored within the database...identify at least one prospective customer of the business entity...create at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...offer the at least one proposed deal to the identified prospective customer by displaying on the at least one client system for the prospective customer the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal...prompt a permissioned



user associated with the business entity to create a deal and a deal library after the prospective customer has selected the at least one proposed deal, wherein the deal library for each selected deal includes an organizational structure for storing information therein that is automatically created based on the type of deal selected, and includes at least one default template automatically stored therein that is based upon the type of deal selected... designate the prospective customer that selected the at least one proposed deal as the customer of the business entity, each deal created at the server representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction... assign members to a deal team for each deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal... assign the customer to the deal team for each selected deal and grant permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal... prompt a user to assign tasks and milestones to be performed by the deal team members for completing each deal, the tasks and milestones are entered using templates stored within the database... notify the deal team members of the assigned tasks to be performed and milestones accomplished... track each task and milestone for completing each deal and enable the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Claim 16, as herein amended, recites a system comprising, among other things, a computer configured as a server and configured to perform steps essentially similar to those recited in Claim 1. Thus, it is submitted that Claim 16 is patentable over the combination of Libman and for reasons that correspond to those given with respect to Claim 1.

Furthermore, newly added Claim 80 depends from independent Claim 16 and recites a system that is further configured to “update the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 80 likewise is patentable over Libman in view of Fredell.

Claim 19 has been canceled. Claims 17, 18 and 20-30 depend, directly or indirectly, upon Claim 16. When the recitations of Claims 17, 18 and 20-30 are considered in combination with the recitations of Claim 16, it is submitted that Claims 17, 18 and 20-30 are likewise patentable over the combination of Libman and Fredell.

Claim 31 recites a apparatus including “means for an administrator associated with a business entity to create business profiles, the business entity engaged in a business of offering at least one of products and services to prospective customers, the business profile includes permissions granted to each user of a plurality of users associated with the business entity for at least one of accessing, creating, and modifying information stored within the database...means for identifying at least one prospective customer of the business entity...means for storing records of identified prospective customers within the database...means for creating at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...means for offering the at least one proposed deal to the identified prospective customer by displaying on a client system the at least one of the web page and portal customized for attracting the prospective customer to the proposed deal...means for prompting a permissioned user associated with the business entity to create a deal and a deal library for each selected proposed deal after the prospective customer has selected the at least one proposed deal, wherein the deal library for each selected deal includes an organizational structure for storing information therein that is automatically created based on the type of deal selected, and includes at least one default template automatically stored therein that is based upon the type of deal selected...means for designating the prospective customer that selected the at least one proposed deal as the customer of the business entity, each deal created representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction...means for assigning members to a deal team for each deal between the business

entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal...means for assigning the customer to the deal team for each selected deal and granting permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal...means for assigning tasks and milestones to be performed by the deal team members for completing each deal...means for notifying the deal team members of the assigned tasks to be performed and milestones...means for tracking each task and milestone for completing each deal...and means for enabling the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Claim 31, as herein amended, recites an apparatus that includes means for performing steps similar to those recited in Claim 1 and those similar to that which the server performs in Claim 16. Thus, it is submitted that Claim 31 is patentable over the combination of Libman and Fredell for reasons that correspond to those given with respect to Claims 1 and 16.

Claims 32-42 depend, directly or indirectly, upon Claim 31. When the recitations of Claims 32-42 are considered in combination with the recitations of Claim 31, it is submitted that Claims 32-40 are likewise patentable over the combination of Libman and Fredell.

Furthermore, newly added Claim 81 depends from independent Claim 31 and recites a recites an apparatus that includes means for “updating the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 81 likewise is patentable over Libman in view of Fredell.

Claims 43-47 have been canceled.

Claim 48 recites a method for initiating a deal transaction between a business entity and at least one customer using a server system coupled to a database and in communication with a client system, the client system having a user interface, the server associated with a business entity engaged in a business of offering at least one of products and services to prospective customers, said method comprising the steps of “prompting an administrator associated with the

business entity to create a business profile at the server system for storing within the database, the business profile includes permissions granted to each user of a plurality of users associated with the business entity for at least one of accessing, creating, and modifying information stored within the database...identifying at least one prospective customer of the business entity...creating at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...offering the proposed deal to the identified prospective customer by displaying on the user interface of the client system the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal...prompting a permissioned user associated with the business entity to create a deal and a deal library at the server system after the prospective customer has selected the at least one proposed deal, the deal library for each selected deal including an organizational structure for storing information therein that is automatically created based on the type of deal selected, and includes at least one default template automatically stored therein that is based upon the type of deal selected...designating the prospective customer that selected the at least one proposed deal as the customer of the business entity within the server system, each deal created at the server representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction...assigning members to a deal team for each deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal...displaying a library template for each deal downloaded from the server system for prompting a user associated with the business entity for each deal to organize documents associated with each deal within the corresponding deal library stored in the database...assigning the customer to the deal team for each selected deal and granting permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal...assigning at the server system tasks and milestones to be performed by the deal team members for completing

each deal...notifying the deal team members of the assigned tasks to be performed and milestones...tracking each task and milestone for completing each deal...and enabling the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Claim 48, as herein amended, recites a method for initiating a deal transaction that includes at least some steps that are similar to those recited in Claim 1. Thus, it is submitted that Claim 48 is patentable over the combination of Libman and Fredell for reasons that correspond to those given with respect to Claim 1.

Claims 49 and 51-54 depend, directly or indirectly, upon Claim 48. When the recitations of Claims 49 and 51-54 are considered in combination with the recitations of Claim 48, it is submitted that Claims 49 and 51-54 are likewise patentable over the combination of Libman and Fredell.

Furthermore, newly added Claim 83 depends from independent Claim 48 and recites a method that further comprises “the step of updating the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 83 likewise is patentable over Libman in view of Fredell.

Claims 55-60 have been canceled.

Claim 61 recites a computer program embodied on a computer-readable medium for managing a deal process between a business entity and a prospective customer, the business entity engaged in a business of offering at least one of products and services to prospective customers, said program comprising at least one code segment that receives information and then “prompts an administrator associated with the business entity to create a business profile for storing within a database, the business profile includes permissions granted to each user of a plurality of users associated with the business entity for at least one of accessing, creating, and modifying accessing information stored within the database...identifies at least one prospective customer of the business entity...creates at least one of a web page and a portal customized for

attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...offers the at least one proposed deal to the identified prospective customer by displaying for the prospective customer the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal...prompts a permissioned user associated with the business entity to create a deal and a deal library after the prospective customer has selected the at least one proposed deal, the deal library for each selected deal including an organizational structure for storing information therein that is automatically created based on the type of deal selected, and includes at least one default template that is automatically stored therein and based upon the type of deal selected...designates the prospective customer that selected the at least one proposed deal as the customer of the business entity, each deal created at the server representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction...assigns members to a deal team for each deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal...assigns the customer to the deal team for each selected deal and grants permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal...assigns tasks and milestones to be performed by the deal team members for completing each deal...notifies the deal team members of the assigned tasks to be performed and milestones...tracks each task and milestone for completing each deal...and enables the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Claim 61, as herein amended, recites a computer program embodied on a computer-readable medium for managing a deal process between a business entity and a prospective customer that includes a code segment that performs steps similar to those recited in Claim 1.

Thus, it is submitted that Claim 61 is patentable over the combination of Libman and Fredell for reasons that correspond to those given with respect to Claim 1.

Claims 62-66 depend, directly or indirectly, upon Claim 61. When the recitations of Claims 62-66 are considered in combination with the recitations of Claim 61, it is submitted that Claims 62-66 are likewise patentable over the combination of Libman and Fredell.

Furthermore, newly added Claim 82 depends from independent Claim 61 and recites a computer program further comprising a code segment that “updates the at least one of the web page and portal associated with the customer based on information stored in the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 82 likewise is patentable over Libman in view of Fredell.

Claim 67 recites a computer for managing a deal process between a business entity and a prospective customer, the computer coupled to a database, the business entity engaged in a business of offering at least one of products and services to prospective customers, the computer programmed to “prompt an administrator associated with the business entity to create a business profile for storing within the database, the business profile includes permissions granted to each user of a plurality of users associated with the business entity for at least one of accessing, creating, and modifying information stored within the database...identify at least one prospective customer of the business entity...create at least one of a web page and a portal customized for attracting the at least one identified prospective customer to at least one deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the at least one proposed deal is specifically targeted by the business entity to the identified prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity, wherein the at least one customized web page and portal stored within the database...offering the at least one proposed deal to the identified prospective customer by displaying for the prospective customer the at least one of the web page and portal customized for attracting the prospective customer to the at least one proposed deal...prompt a permissioned user associated with the business entity to create a deal and a deal library after the prospective customer has selected the at least one proposed deal, wherein the deal library for each selected

deal includes an organizational structure for storing information based therein that is automatically created based on the type of deal selected, and includes at least one default template that is automatically stored therein and based upon the type of deal selected...designate the prospective customer that selected the at least one proposed deal as the customer of the business entity, each deal created at the server representing a financial transaction between the customer and the business entity, each deal library representing a portion of the database for storing documents created as part of the financial transaction...assign members to a deal team for each deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal...assign the customer to the deal team for each selected deal and grant permissions to the customer for accessing specific documents stored in the deal library corresponding with each selected deal...assign tasks and milestones to be performed by the deal team members for completing each deal...notify the deal team members of the assigned tasks to be performed and milestones...track each task and milestone for completing each deal...and enable the customer to monitor the progress of each assigned deal by displaying on the client system a status of each assigned deal.”

Claim 67, as herein amended, recites a computer program embodied on a computer-readable medium for managing a deal process between a business entity and a prospective customer that includes a code segment that performs steps similar to those recited in Claim 1. Thus, it is submitted that Claim 67 is patentable over the combination of Libman and Fredell for reasons that correspond to those given with respect to Claim 1.

Claims 68-70 depend, directly or indirectly, upon Claim 67. When the recitations of Claims 68-70 are considered in combination with the recitations of Claim 67, it is submitted that Claims 68-70 are likewise patentable over the combination of Libman and Fredell.

Furthermore, newly added Claim 84 depends from independent Claim 67 and recites a computer for managing a deal process wherein the computer is programmed to “update the at least one of the web page and portal associated with the customer based on information stored in



the database and obtained from completing a prior deal for the customer.” Applicants submit that dependent Claim 84 likewise is patentable over Libman in view of Fredell.

Claim 71-74 has been canceled.

For the reasons given above, it is respectfully requested that the rejection of Claims 1-3, 5-18, 20-42, 48-49, 51-54, 61-70 and 75-78 under 35 U.S.C. § 103(a) as being unpatentable over the combination of Libman and Fredell be withdrawn.

The rejection of Claims 54 and 66 as being unpatentable over Libman is respectfully traversed. Applicants have canceled Claims 54 and 66. Applicants respectfully request the rejection under 35 U.S.C. § 103(a) be withdrawn.

In view of the foregoing amendments and remarks, all the Claims now active in the application are believed to be in condition for allowance. Favorable action is respectfully solicited.

Respectfully Submitted,



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